



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

REMODELLING THE LOCAL DOMESTIC TOURISM MARKET IN SOUTH AFRICA WITHIN A COVID-19 ENVIRONMENT

**Tourism Research Seminar: “Advancing Tourism Growth through research:
Towards a road to Tourism Recovery**

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18 March 2022



Covid-19

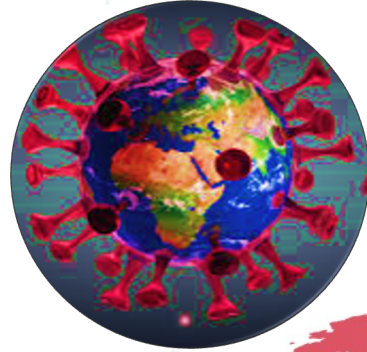


Tourism

2020

JANUARY-OCTOBER

INTERNATIONAL TOURIST ARRIVALS



WORLD

WORLD 2019: 1.5 BILLION (+4%)

JANUARY-OCTOBER 2020: **-72%**

AMERICAS

2019
219 MN (+1%)

JAN-OCT 2020:
-68%

EUROPE

2019
744 MN (+4%)

JAN-OCT 2020:
-68%

AFRICA

2019
70 MN (+2%)

JAN-OCT 2020:
-69%

MIDDLE EAST

2019
65 MN (+8%)

JAN-OCT 2020:
-73%

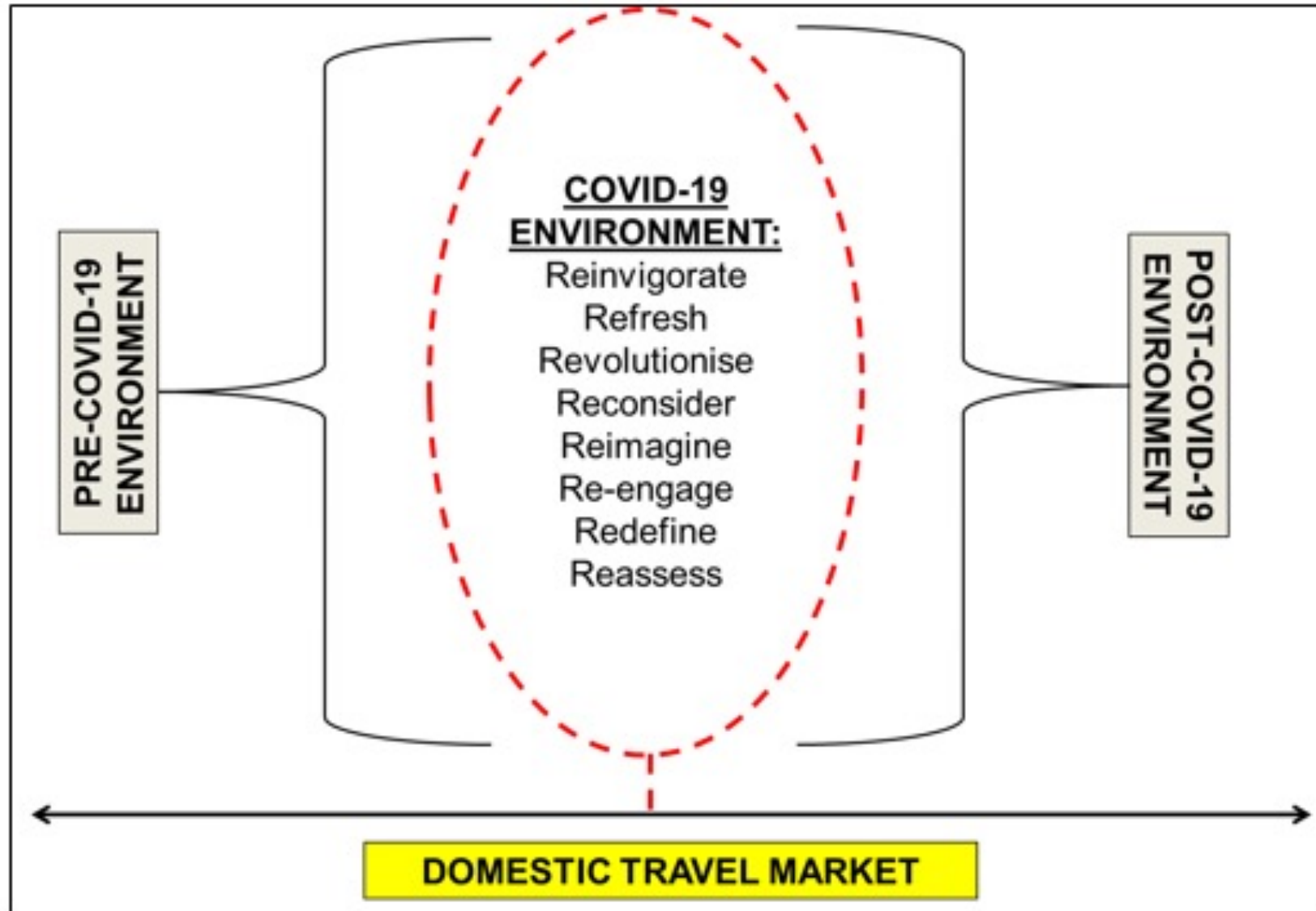
ASIA & THE PACIFIC

2019
361 MN (+4%)

JAN-OCT 2020:
-82%



Figure 1: The reframing of domestic tourism to reignite the travel market



SWOT analysis

- Domestic level

Covid-19 impact

- Tourism overall
- Domestic tourism

Innovative interventions

- Proactive mechanisms
- Innovative interventions

Domestic Tourism



environment
& tourism

Department:
Environmental Affairs and Tourism
REPUBLIC OF SOUTH AFRICA



tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

1985



2010

1985: Domestic Tourism Committee

'See The World in Your Country',

Get-up-and-go-guide



2004 - Domestic Tourism Growth Strategy (DTGS)

Contribute to GDP growth, job creation and transformation through four key objectives:

- 1 - increased expenditure (more trips, length of stay, average trip expenditure);
- 2 - reduced seasonality;
- 3 - improved geographic spread;
- 4 - increased volumes

2012 - Domestic Tourism Growth Strategy (DTGS)

Developing a sustainable domestic tourism market, addressing domestic tourism's uneven geographic spread and seasonality. Four strategic objectives:

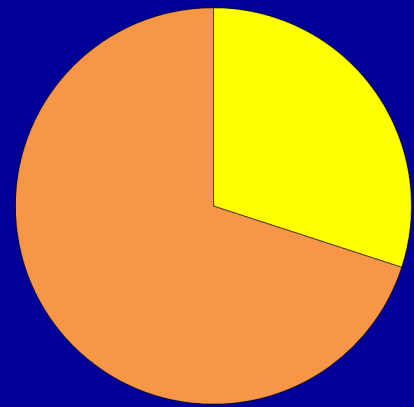
- 1 - Increase domestic tourism revenue
- 2 - Increase domestic tourism volume
- 3 - Improve measures and efforts aimed at addressing seasonality and equitable geographical spread
- 4 - Enhance the level of the culture of travel and tourism among South Africans

Domestic Tourism Growth Strategy (DTGS)

“whilst the intention is to develop domestic tourism as the backbone of the sector, activities/actions on the ground have not reflected the **vigour** necessary to achieve this – the status quo remains”.

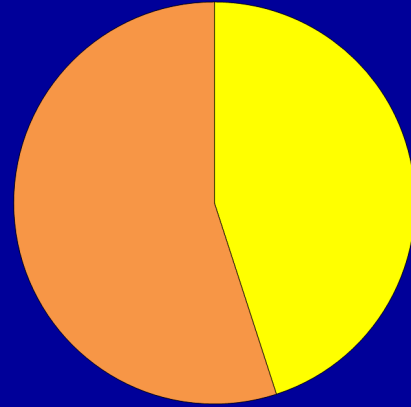
Parliamentary Monitoring Group, *Domestic Tourism Strategy Review*
– *Theory of Change Approach*, 2015, p. 2.

South Africa's domestic tourism market segment



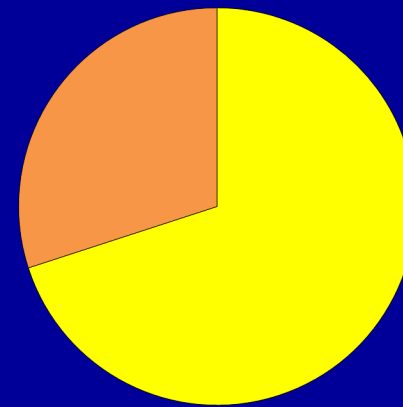
1990-2000

■ International tourism segment
■ Domestic tourism segment



2001-2010

■ International tourism segment
■ Domestic tourism segment



2011-2020

■ International tourism segment
■ Domestic tourism segment



DOMESTIC TOURISM IN GENERAL

DOMESTIC TOURISM IN SOUTH AFRICA

DOMESTIC TOURISM AND COVID-19

R. Scheyvens (2017) uses Samoa as a case study to illustrate the importance of domestic tourism. She aptly notes that:

in many countries there is an insidious perception that domestic tourism is the ‘poor cousin’ of the more glamorous international tourism market, and that domestic tourism cannot bring the same range of development benefits to a country.

- domestic tourism does not need as much foreign investment to develop;
- is less vulnerable to seasonal fluctuations and international events;
- contributes more to local economic development because of higher sales of locally produced products;
- local production is more labour intensive thereby providing more employment opportunities;
- through all the previously mentioned, there are more multiplier effects.

R. Scheyvens, ‘Poor cousins no more: valuing the development potential of domestic and diaspora tourism’, *Progress in Development Studies* 7(4), 2007, pp. 307-325.



2018: “The domestic tourism sector” can assist and enable a country to “withstand shocks and demand fluctuations that may arise when crises affect external source markets”.

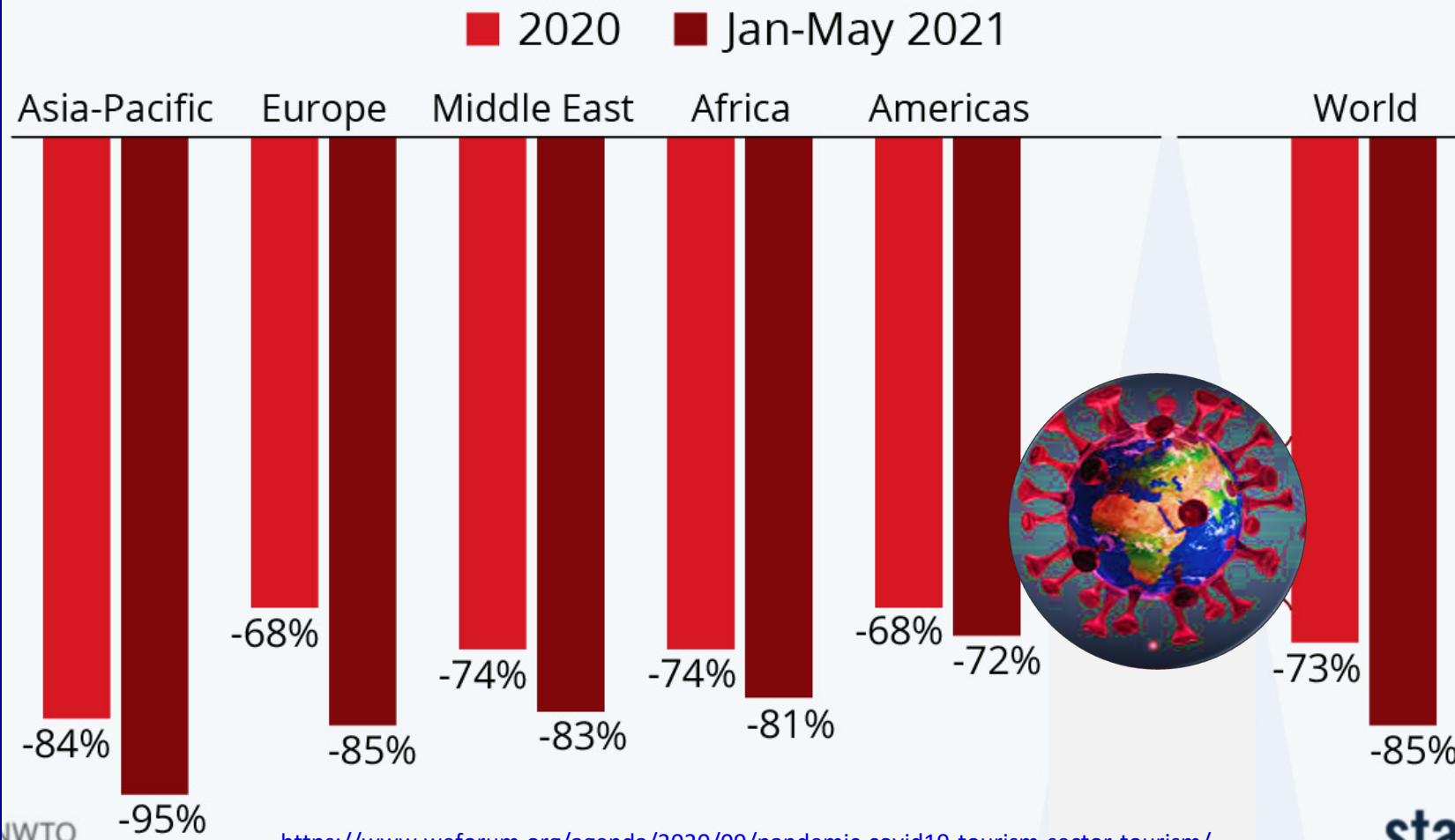
M. Adinolfi, V. Harilal and J. Giddy (2020) in their article focused on the post COVID-19 Domestic Tourism Landscape in South Africa, state categorically that:

“the **promotion** of domestic tourism is the best way to ensure the recovery of the tourism industry”.

M. C. Adinolfi, V. Harilal, J. K. Giddy, 'Travel Stokvels, Leisure on Lay-buy, and Pay at Your Pace Options: The Post COVID-19 Domestic Tourism Landscape in South Africa', *African Journal of Hospitality, Tourism and Leisure* 10(1), 2020, p. 311.

International Travel Goes From Bad to Worse in Early 2021

Change in international tourist arrivals compared to 2019



Restructuring mechanisms - 2020

**# TRAVEL
TOMORROW**



UNWTO: Priorities for Tourism Recovery & Global Guidelines to Restart Tourism

UNWTO - Tbilisi Declaration: Actions for Sustainable Recovery

“Opportunity to rethink how we do tourism ”

UNWTO: Understanding Domestic Tourism and Seizing its Opportunities

WTTC: #TogetherInTravel

SafeTravels: Global Protocols and Stamp for the new normal

WTTC: COVID-19 Lessons Learnt

Global North recovery campaigns



New Zealand, Slovenia & Portugal

Global South recovery campaigns



Philippines, Fiji and Brazil

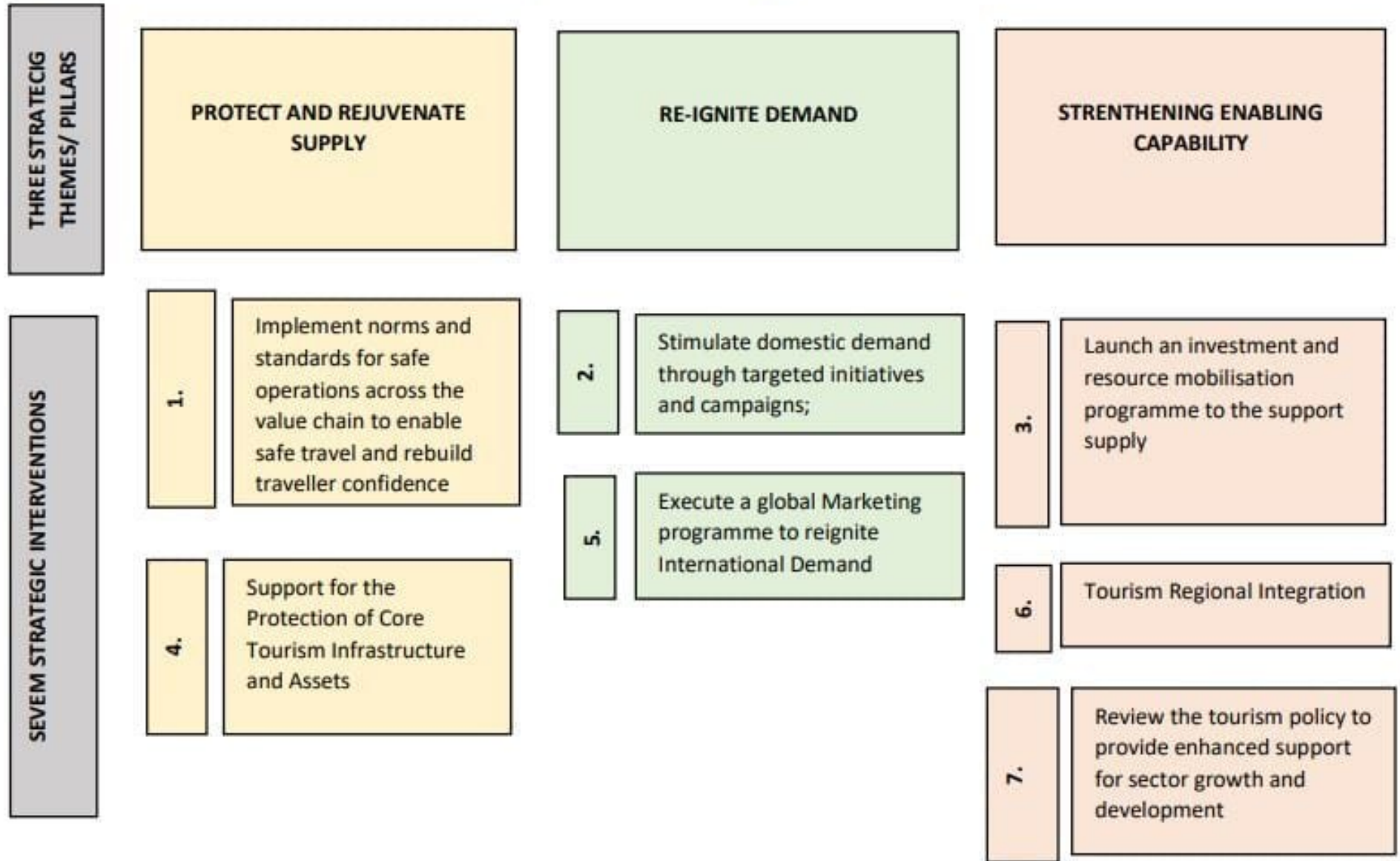


Tourism Sector Recovery Plan – The Approach

TOURISM SECTOR RECOVERY PLAN

COVID-19 Response

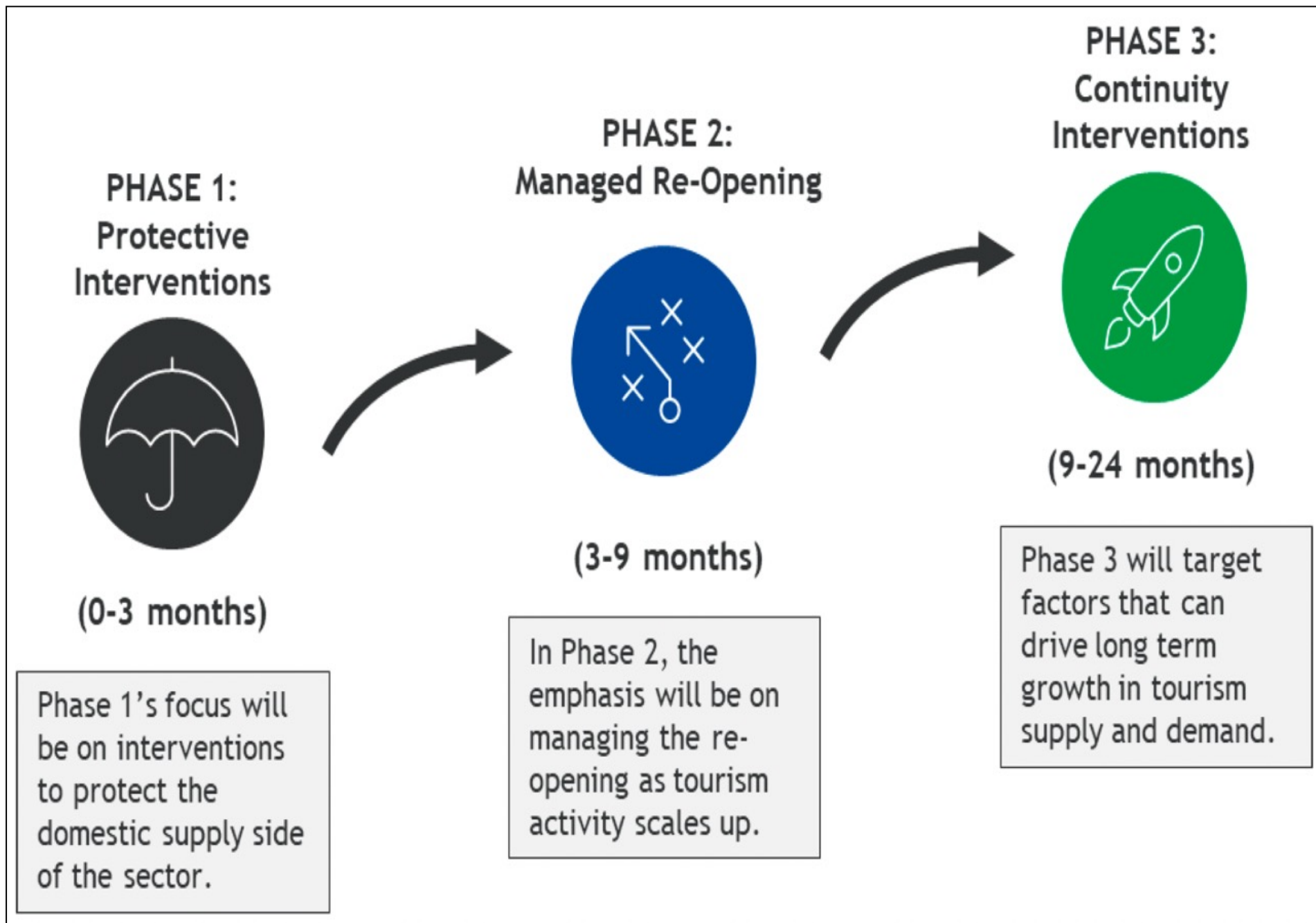
2020



TOURISM SECTOR RECOVERY PLAN

COVID-19 Response

2020





TOURISM SECTOR RECOVERY PLAN

COVID-19 Response

2020

THE **SIXTH** STRATEGIC RECOMMENDATION IS DEDICATED TO DOMESTIC TOURISM:

Domestic demand be catalysed “through the phases of economic re-opening with informative and inspirational messaging that encourages safe tourism”.

Domestic tourists will first be attracted to “hyper-local” experiences, followed by overnight and regional trips once the country’s Risk Adjusted Strategy allows such mobility.

Re-ignition of the domestic market will occur in phases as lockdown restrictions are eased:. Four phases are identified:

- **Cabin Fever Breakout;**
- **Substitution Tourism;**
- **Staycation Tourism;**
- **New Experiential Consumer.**

South African Tourism, *Tourism Sector Recovery Plan: COVID-19 Response*, 2020.

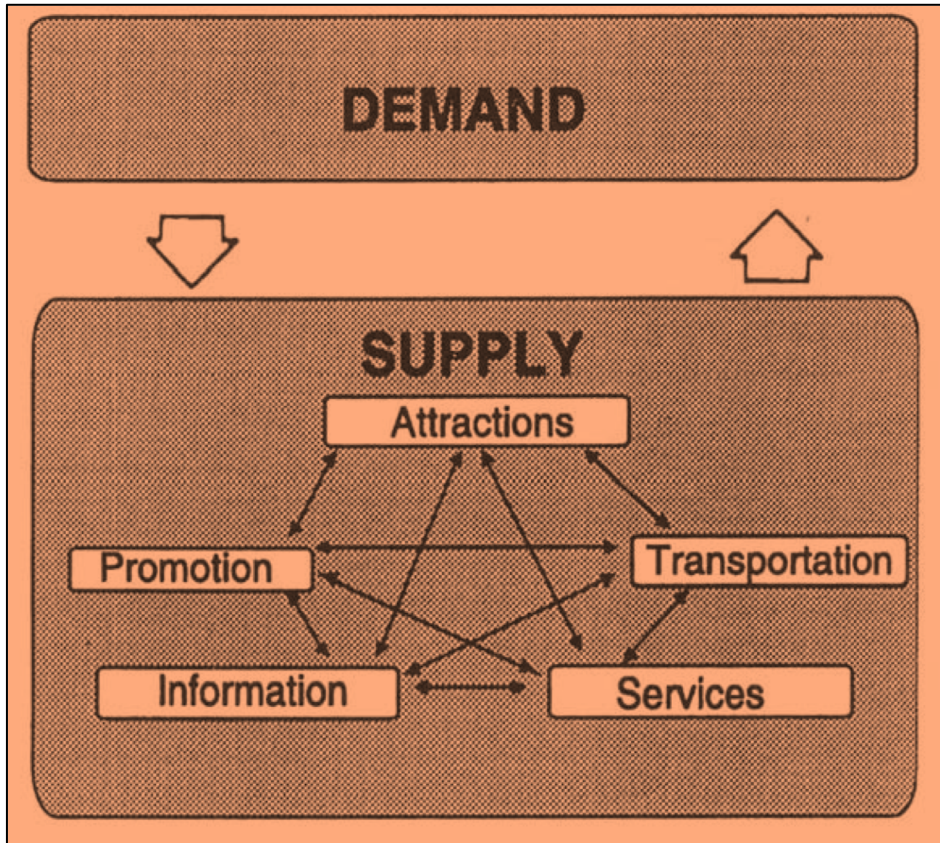
- 1. Implement norms and standards for safe operation across the tourism value chain to enable safe travel and rebuild traveller confidence**
- 2. Stimulate domestic demand through targeted initiatives and campaigns**
- 3. Strengthening the **supply-side** through resource mobilisation and investment facilitation**
- 4. Support for the protection of core tourism infrastructure assets**
- 5. Execute a global marketing programme to reignite international demand**
- 6. Tourism regional integration**
- 7. Review the tourism policy to provide enhanced support for sector growth and development.**

A wide-angle landscape photograph showing a mountain range with a prominent plateau in the distance. A reservoir is visible in the middle ground, and a dirt road winds through the valley. The foreground is filled with green vegetation and rocky outcrops. The sky is blue with scattered white clouds.

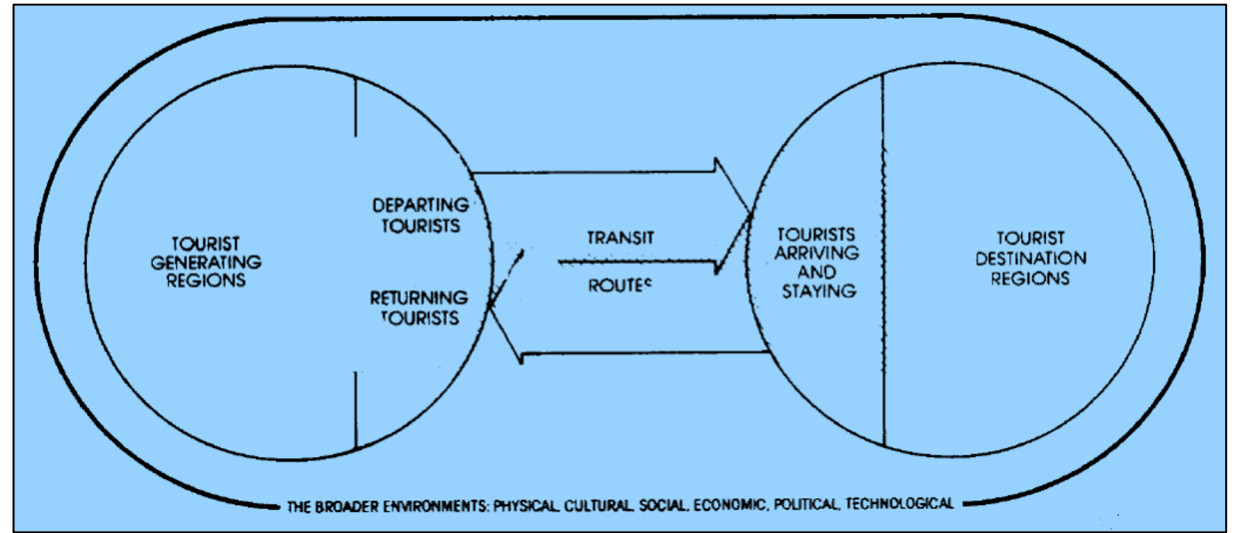
**DON'T TRAVEL NOW,
SO YOU CAN TRAVEL LATER**

TOURISM MODELS

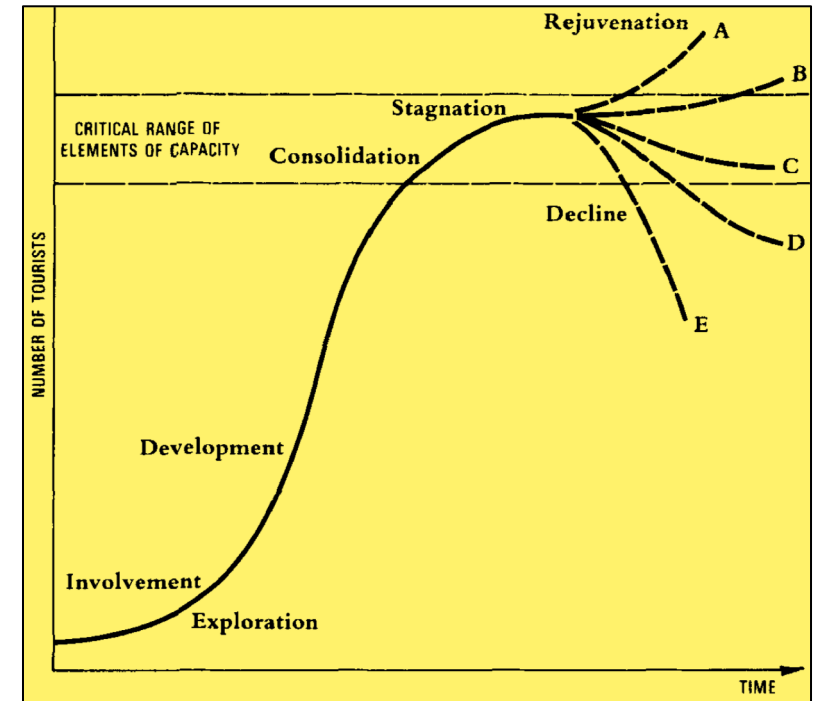
Gunn



Leiper

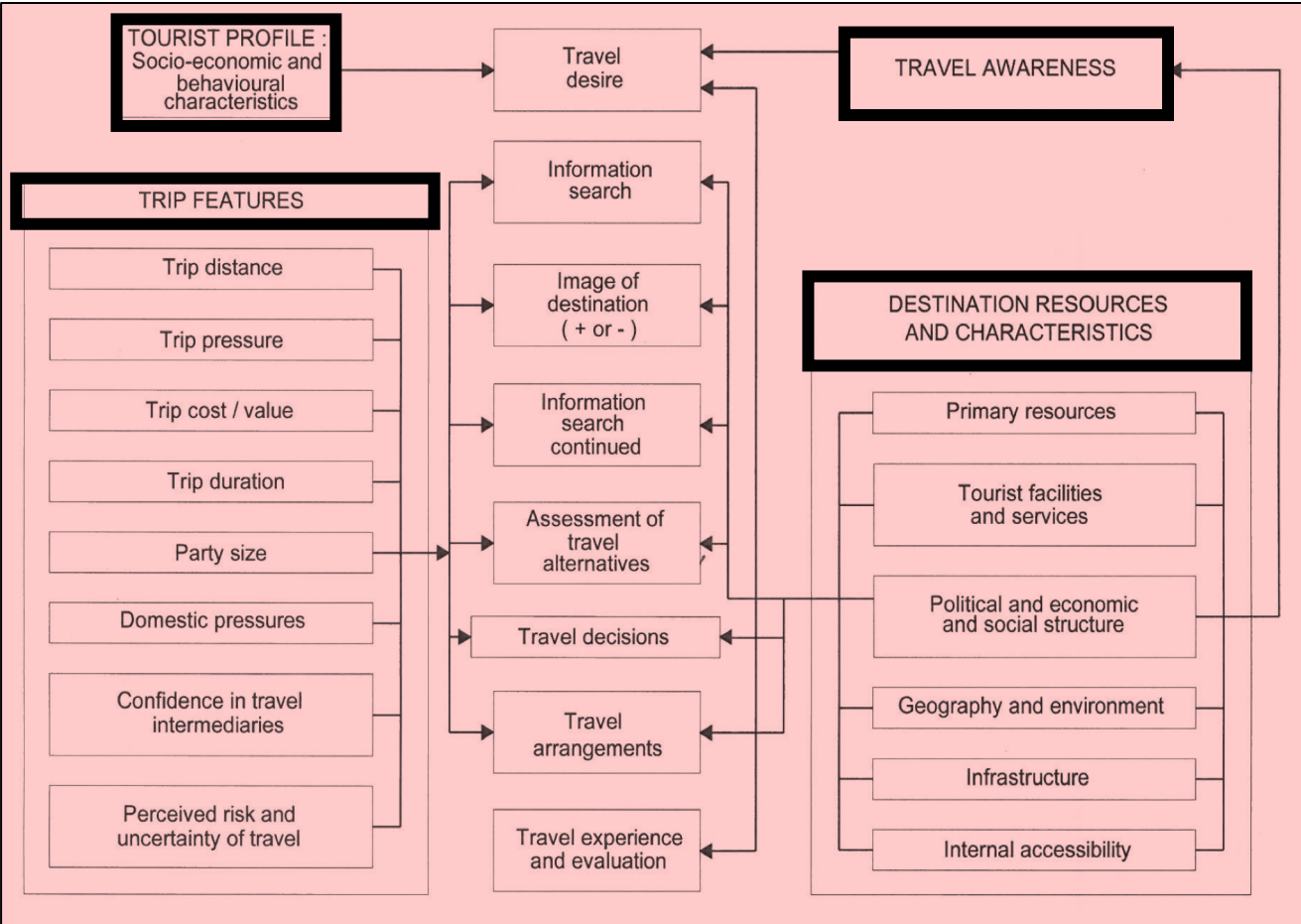


Turner

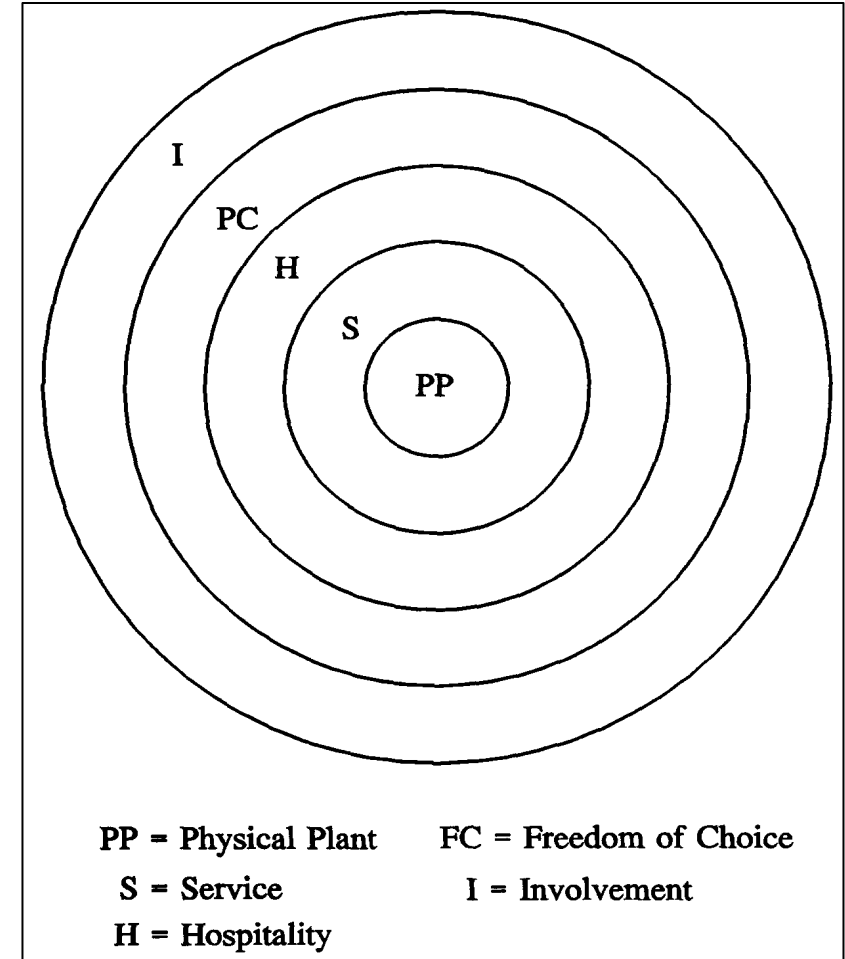


TOURISM MODELS

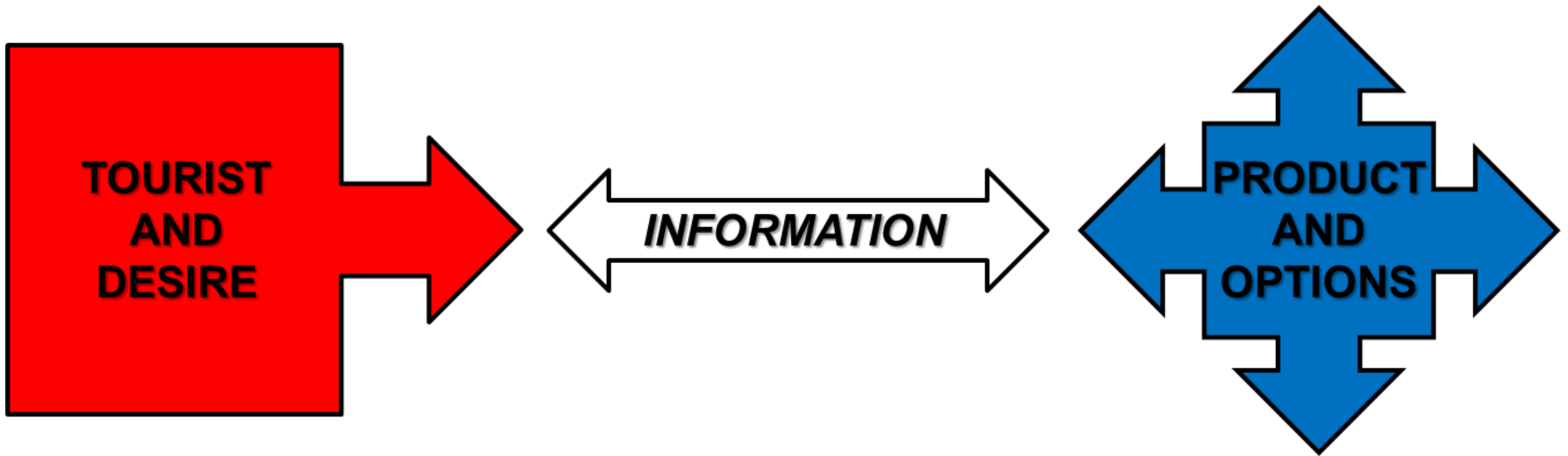
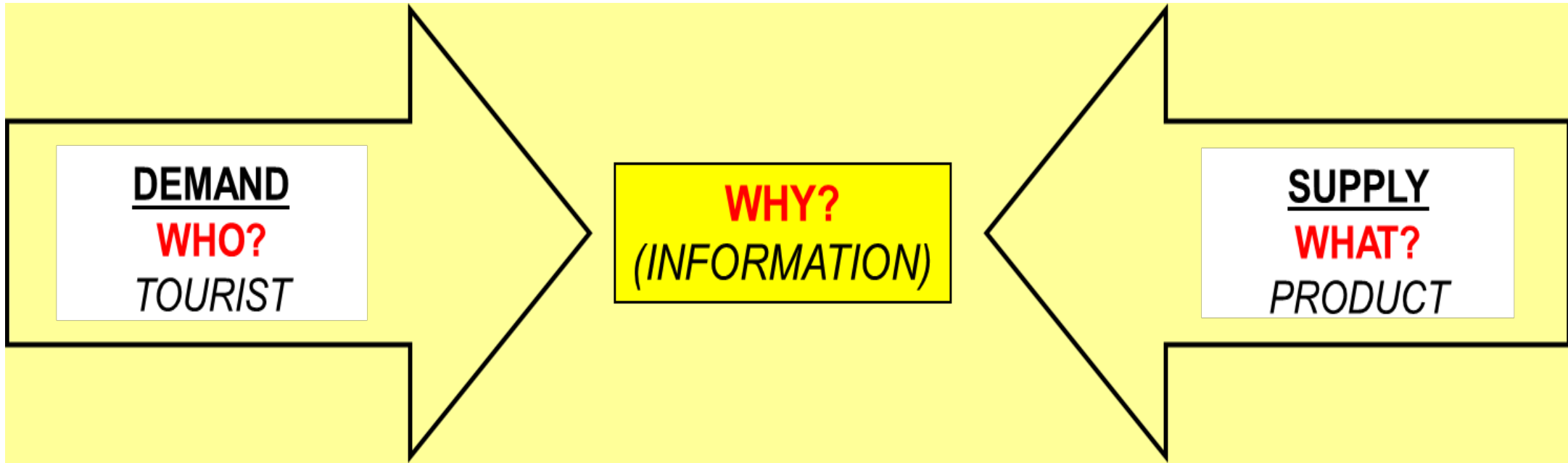
Mathieson and Wall

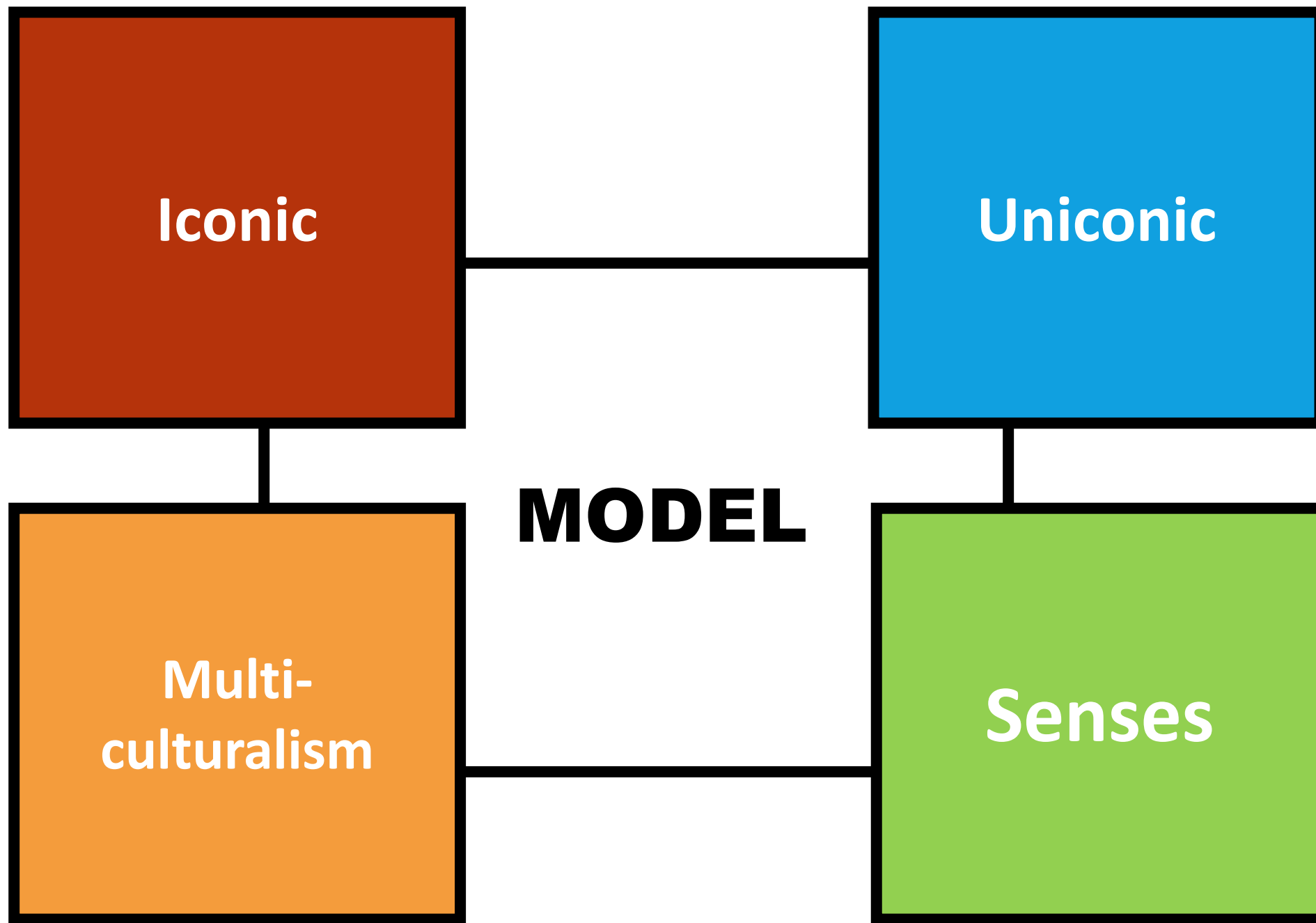


Smith



APPRAISAL OF CONVENTIONAL TOURISM MODELS		CRITERIA																										
		Tourist	Product	Demand	Supply	(Services)	(Attractions)	(Transport)	(Information)	(Promotion)	Environment	Generating Area	Transit Area	Destination	Cyclical	(Exploration)	(Involvement)	(Development)	(Consolidation)	(Stagnation)	(Decline/Rejuvenation)	Desire to Travel	Decision to Travel	Preparation/Experience	Satisfaction/Evaluation	Hospitality	Choice	Involvement
MODELS	"FTS" Gunn-(1972)	X	X	X	X	X	X	X	X	X																		
	"TS" Leiper-(1979)	X	X	X	X	X	X				X	X	X	X	X													
	TALC Butler-(1980)		X		X											X	X	X	X	X	X							
	CTDMP-Mathieson & Wall (1982)	X	X	X	X		X		X		X											X	X	X	X			
	Smith (1994)	X	X			X	X		X														X			X	X	X





The Domestic Tourism Remodelling Model (DTRM)

Iconic

popular and well-recognised tourist attractions; feature prominently in all destination marketing materials; drawcards for tourists to a specific area; highly regarded attractions of choice and cater to local, provincial and national audiences; purpose-built infrastructures and auxiliary services are well-developed and comply with industry standards and tourist expectation; information regarding these attractions well developed, well-known and widely promoted.

Uniconic

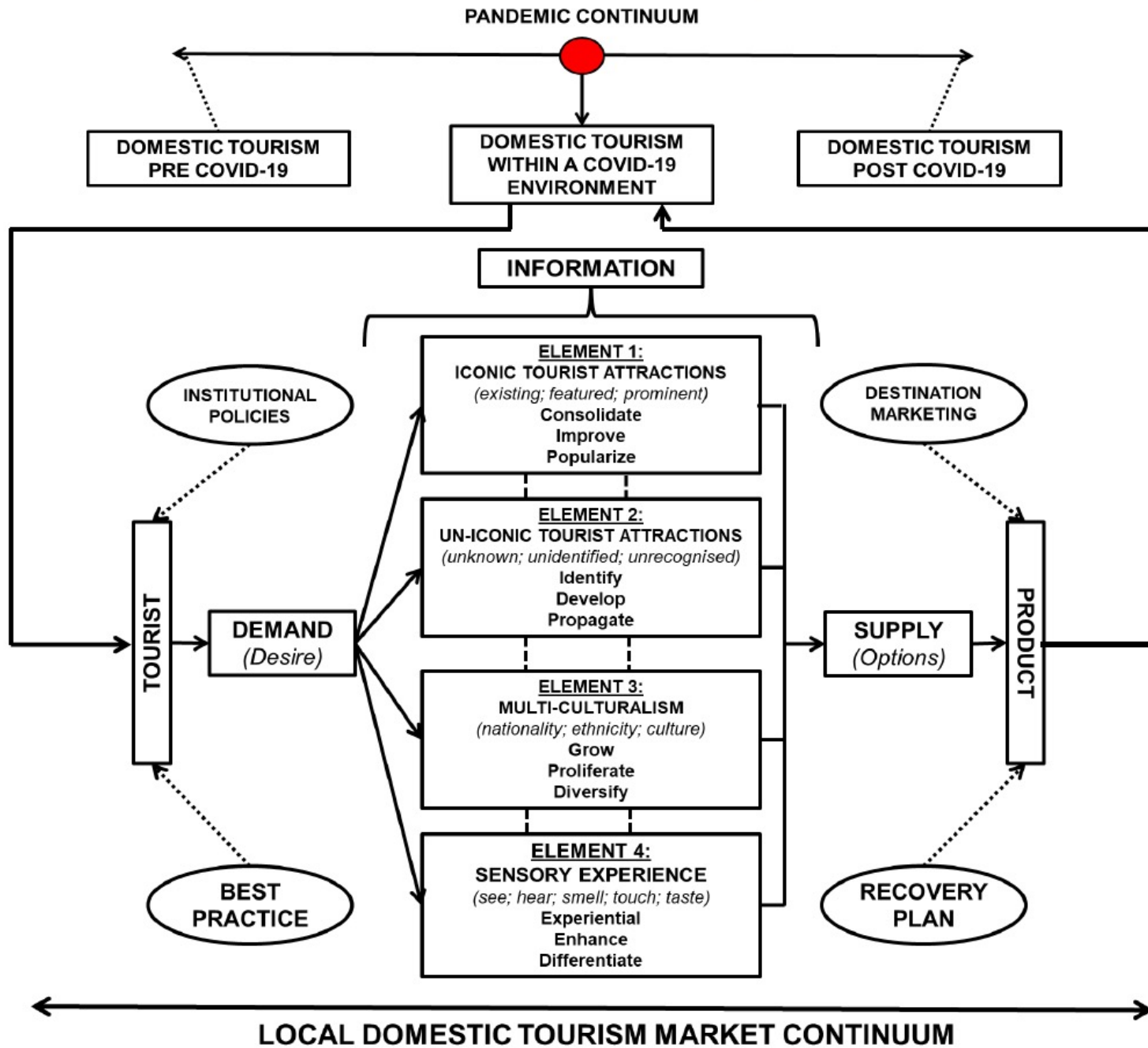
under-acknowledged, unidentified, and unrecognised tourist attractions; attractions that are in principle unknown to tourists; hardly ever feature in destination marketing materials; generally unknown to tourists; might not be highly regarded tourist attractions they still have the inherent potential to attract and interest a local, provincial and national audience; have no infrastructures and/or auxiliary services and are mostly underdeveloped; void of tourist drawcards.

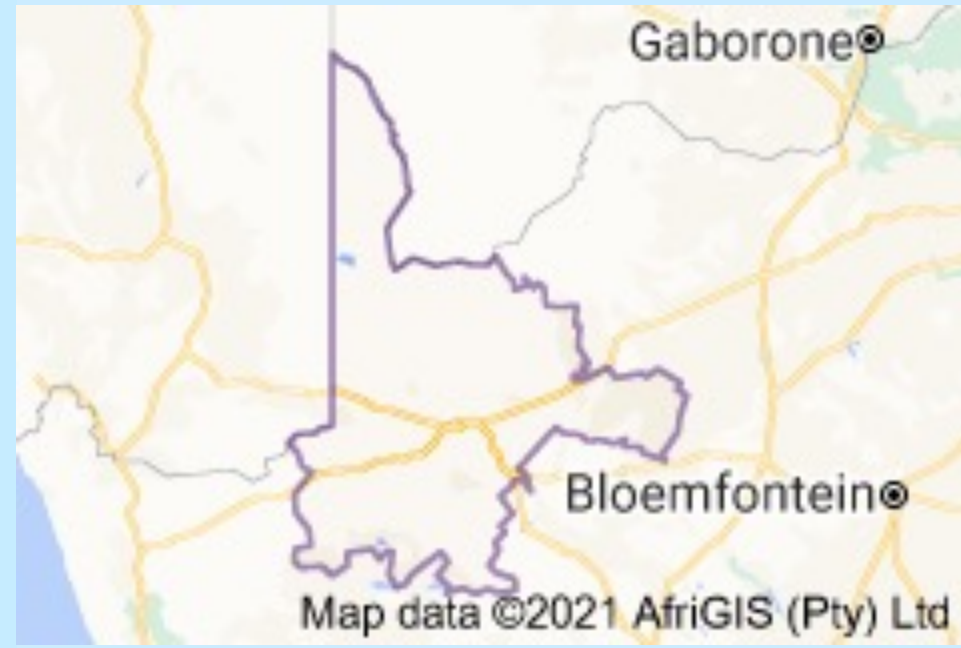
Multi-culturalism

the inclusion of diverse backgrounds, cultures, races, nations and ethnicities; goes beyond the identification of the local to incorporate a broader spectrum of tangible and intangible elements which in the context of tourism includes flavours, traditions, practices, histories, trends and contributions; multiculturalism aligns with the idea of showcasing all cultures found within a specific region, albeit it be beyond the known, recognised and dominant identities within a particular travel landscape.

Senses

incorporating all five senses into the touristic encounter within an attraction this has the potential to make for a more holistic and diversified experience; go beyond merely “seeing an attraction” the tourist should be engaged to hear, smell, taste and touch the elements of the attraction. This will enhance the overall sensory experience at the tourist attraction giving it a more fulfilling, encompassing and satisfying dimension





Iconic



Uniconic



Multi-culturalism



Senses



SEE



TOUCH

FIVE SENSES



HEAR

SMELL

TASTE

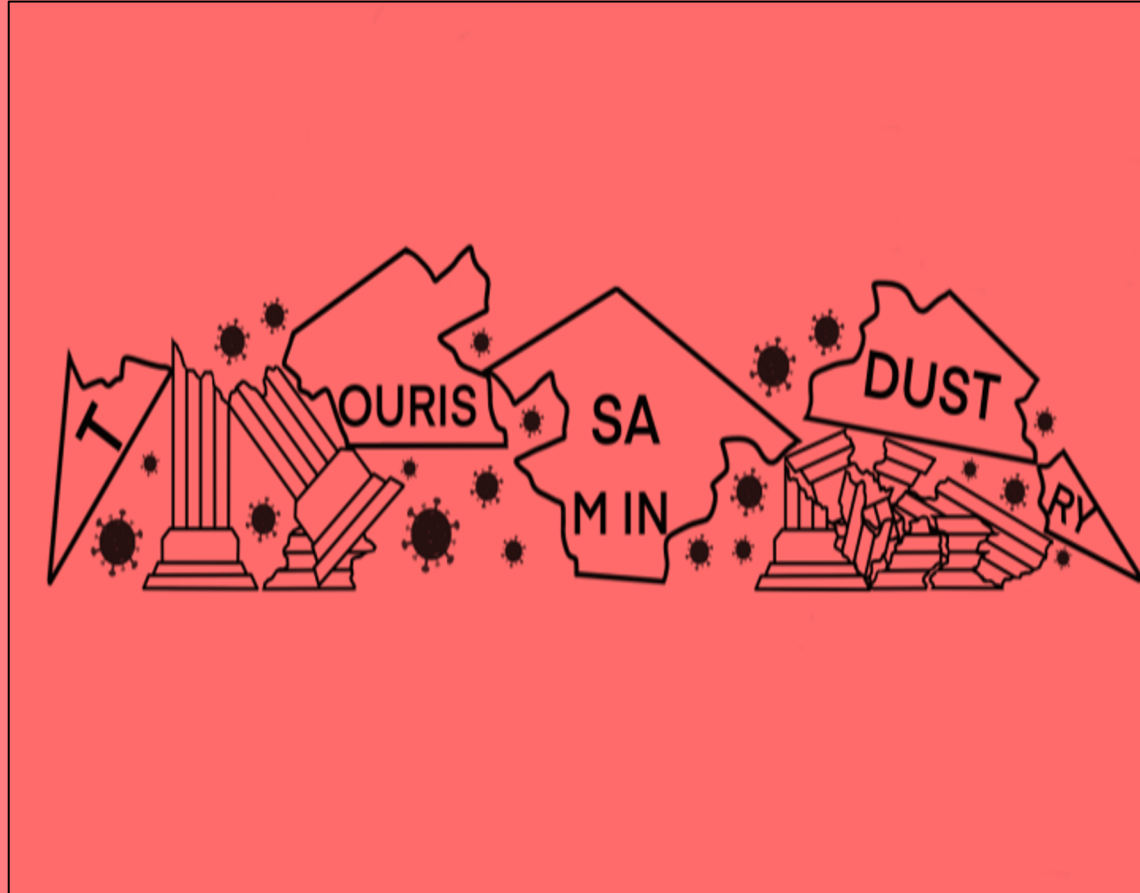
CEO of SA Tourism (2020):

“After an incredibly challenging and uncertain year, everything is **different**, so shouldn't we all holiday **differently**, too? We need to refresh travel experiences for people in South Africa, explore the **hidden gems**, take the **road less travelled** and go **off the beaten track**. Nothing is what it used to be. We need to show them a better and **different** way to experience tourism in the long-term, but most importantly, show them how to do summer **differently** in the short-term”.

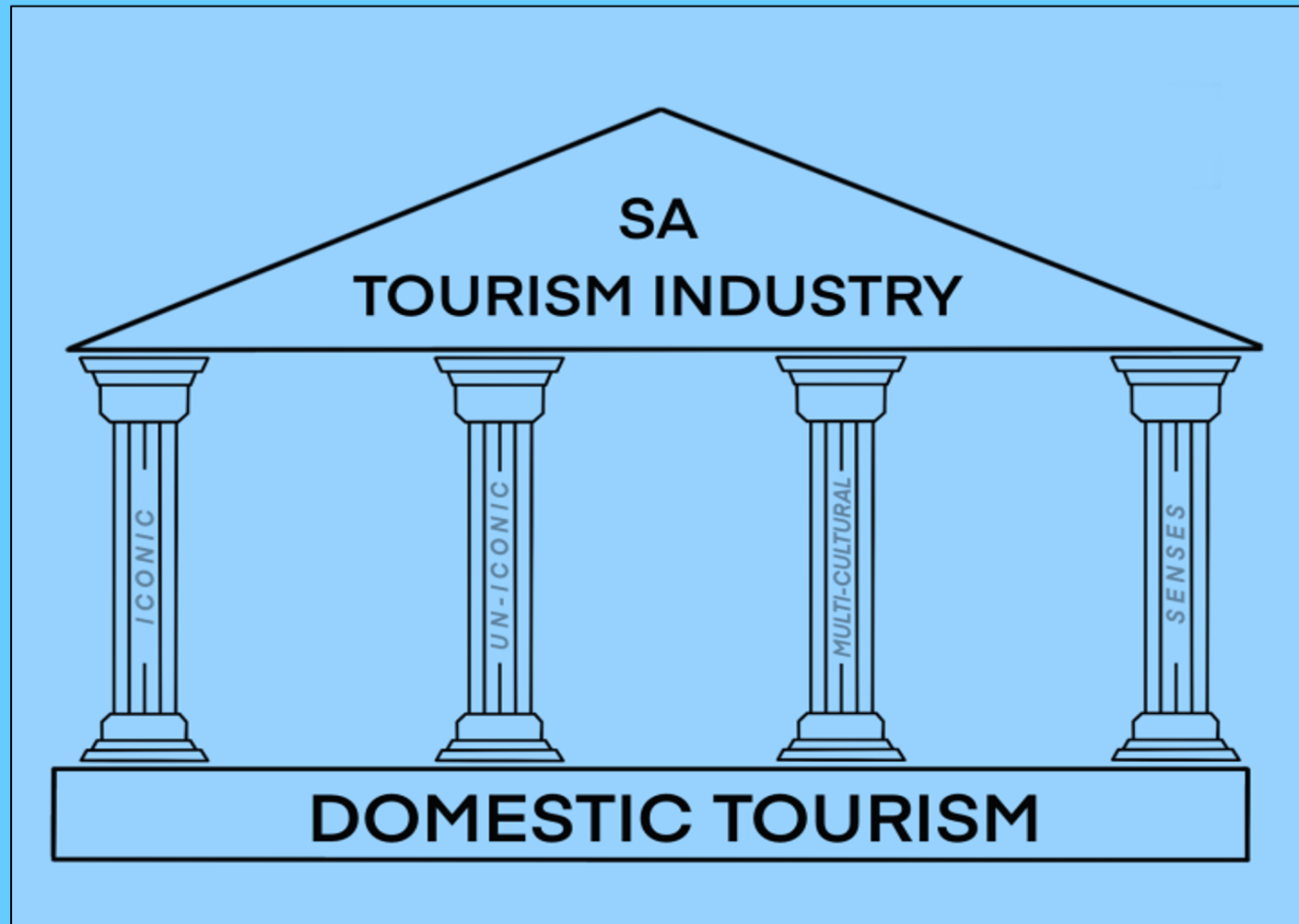
Brand South Africa, 'South African Tourism announces campaign to inspire South Africans to summer differently', <<https://www.southafrica.net/gl/en/corporate/press/south-african-tourism-announces-campaign-to-inspire-travellers-to-do-summer-differently>>, 27 November 2020, access: 08 August 2021.

Tourism in South Africa: Pre-COVID-19

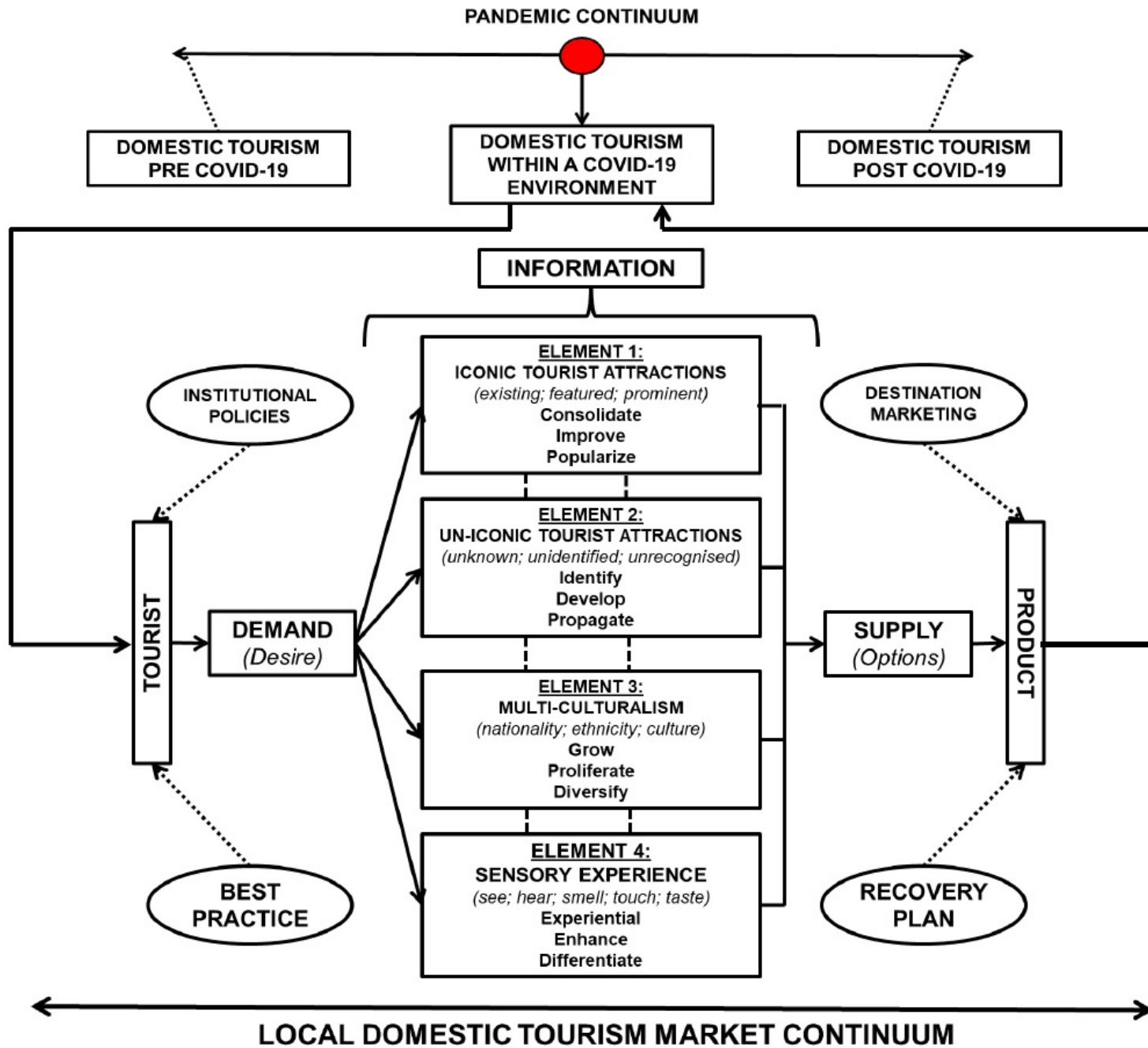




Tourism in South Africa within a COVID-19 environment



Tourism in South Africa in the future





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Thank you!

